



Clerk User Manual

Access Idaho's PayPort™ customizable point-of-sale system conveniently enables your agency to accept credit/debit card payments (Discover, MasterCard, VISA) for virtually any type of sales transaction.

This manual details the steps necessary for you to create and process transactions for customers who pay in person, by fax, or by telephone.

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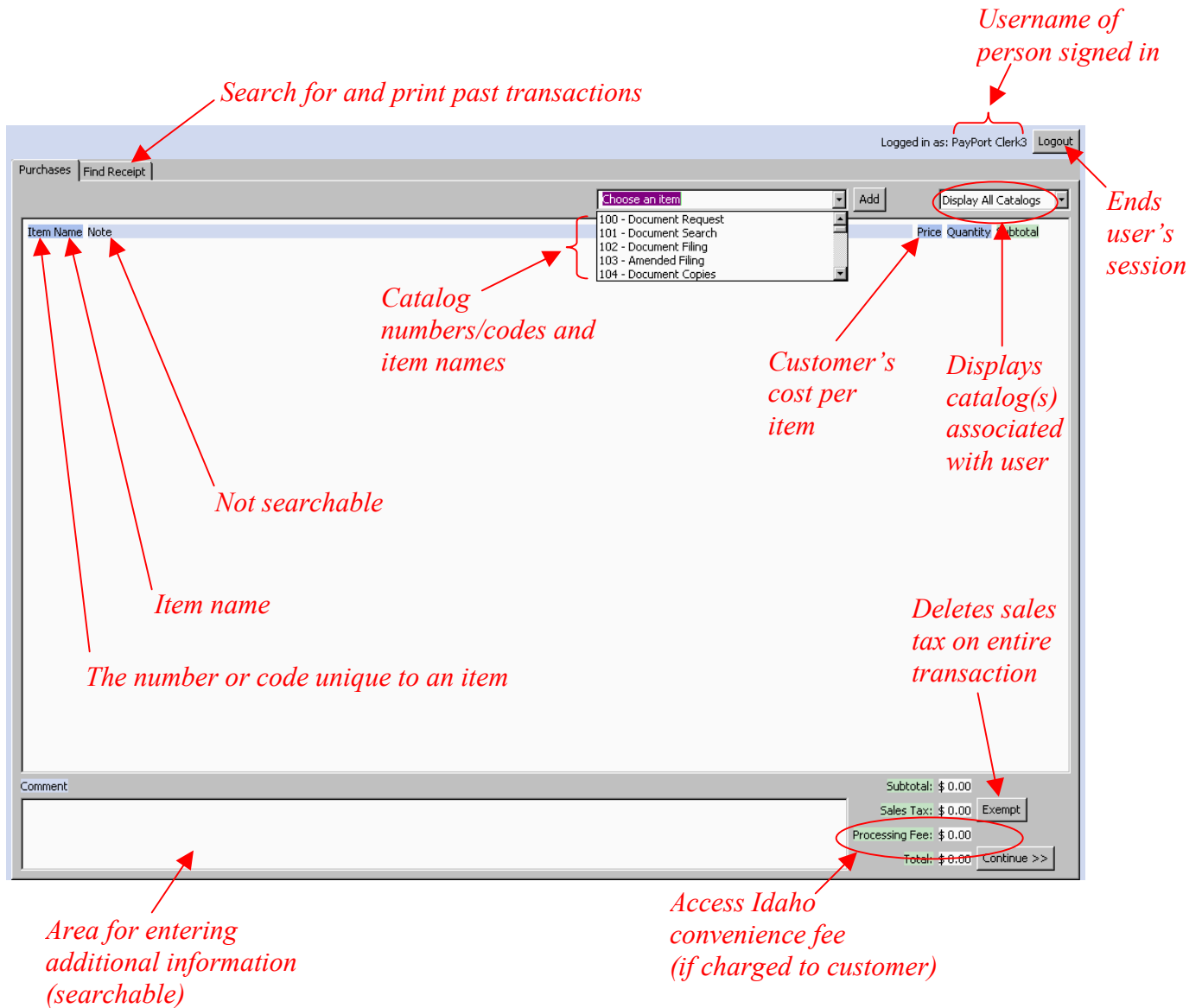
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Section 1: PayPort at a Glance



Section 2: Optional Card Reader

While a credit/debit card reader is not required to use PayPort, it does improve a transaction's speed and accuracy when a card is presented for payment.

Access Idaho sells card readers (see Figure 1 and features below) at cost, however you are welcome to use existing readers or order new ones on your own. Regardless of the type or brand, be sure the reader you use features **keyboard emulation**. *NOTE: The computer(s) you connect card reader(s) to must have internet access.*

Magtek Card Reader Features

- Keyboard emulation
- Powered by USB (No external power supply required)
- Scans either direction
- Includes USB interface
- Green/red LED
- Part #21040109
- www.magtek.com
- Questions? Call Access Idaho at 208-332-0102.

Dimensions

Height: 1.23 in (31,3 mm)
Width: 1.28 in (32,5 mm)
Length: 3.94 in (100 mm)



Figure 1 Magtek Credit Card Reader

One Step Set-up

Simply plug the card reader into a computer's available USB port (Figure 2). The reader's light should turn green, and your computer may make a sound to confirm a successful connection.

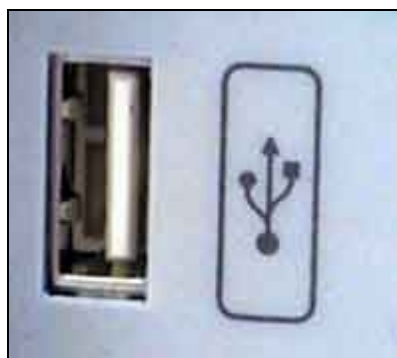
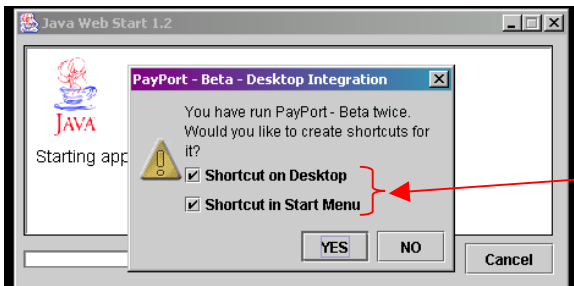
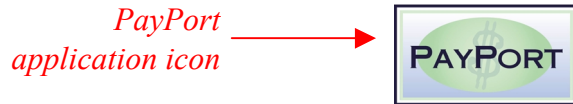


Figure 2 USB Port

Section 3: Logging into PayPort

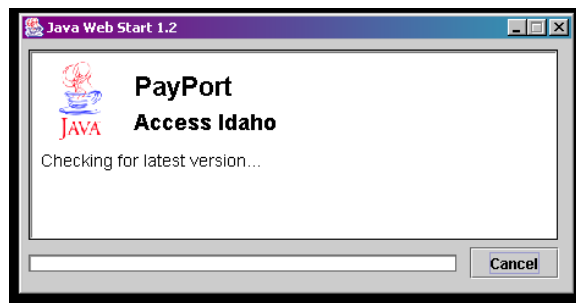
NOTE: If your computer does not have the PayPort application installed on it, go to <http://idaho.gov/payport> to download the software.

Double-click the PayPort link or icon located on your desktop.

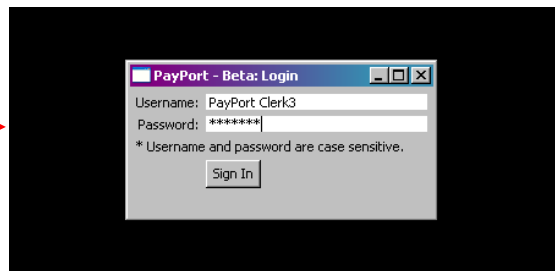


When launching PayPort for the first time, you will have the option to save a shortcut to your Desktop and/or Start Menu for easier access.

Each time you log-in, PayPort automatically updates your version of the software and loads it while displaying the following screens:



Login screen →



Section 4: Item Types

The following examples illustrate common item types and how they are entered in PayPort. Consult your agency's Catalog Manager for questions or further details.

Item Type Examples:

1. **Fixed Price**—Item with the same pre-set price per item, regardless of quantity

The screenshot shows the PayPort interface with the 'Purchases' tab selected. The 'Find Receipt' button is visible. The search bar contains '102 - Document Filing'. The 'Add' button is next to it. The 'Display All Catalogs' dropdown is also visible. The table below shows the item details:

Item Name	Note	Price	Quantity	Subtotal	
102 - Document Filing		\$ 3.00	3	\$ 9.00	Remove
102 - Document Filing		\$ 3.00	20	\$ 60.00	Remove

A red circle highlights the 'Price' and 'Quantity' columns for the first two rows. A red arrow points from the text 'Item with the same pre-set price per item, regardless of quantity' to the first row. A modal window is open for 'Ordering: 102 - Document Filing' with a 'Quantity' field set to 50 and 'OK' and 'Cancel' buttons.

2. **Price/Note**—Item with pre-set pricing and space for additional info

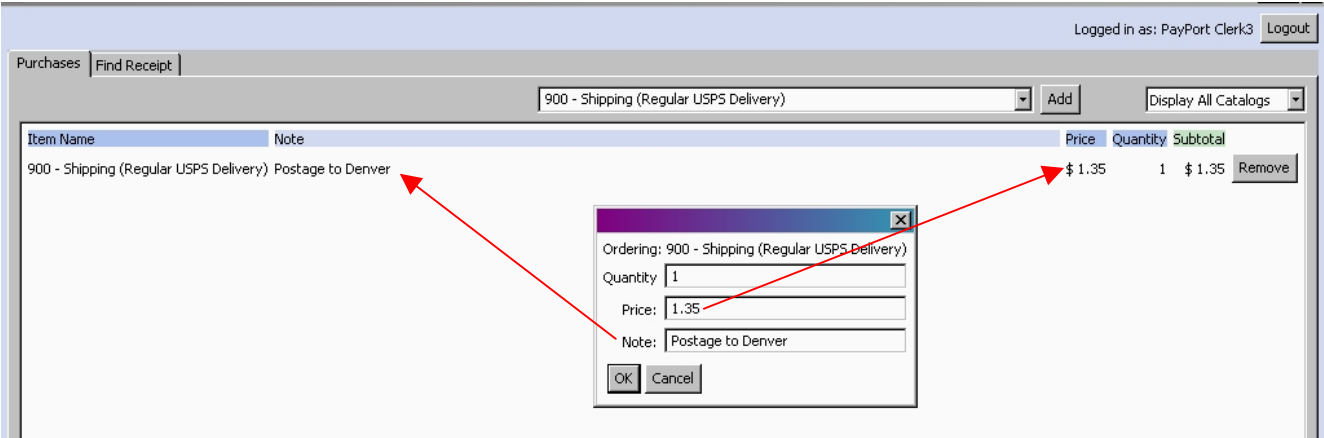
The screenshot shows the PayPort interface with the 'Purchases' tab selected. The 'Find Receipt' button is visible. The search bar contains '101 - Document Search'. The 'Add' button is next to it. The 'Display All Catalogs' dropdown is also visible. The table below shows the item details:

Item Name	Note	Price	Quantity	Subtotal	
101 - Document Search	Lien #8376378	\$ 3.00	1	\$ 3.00	Remove

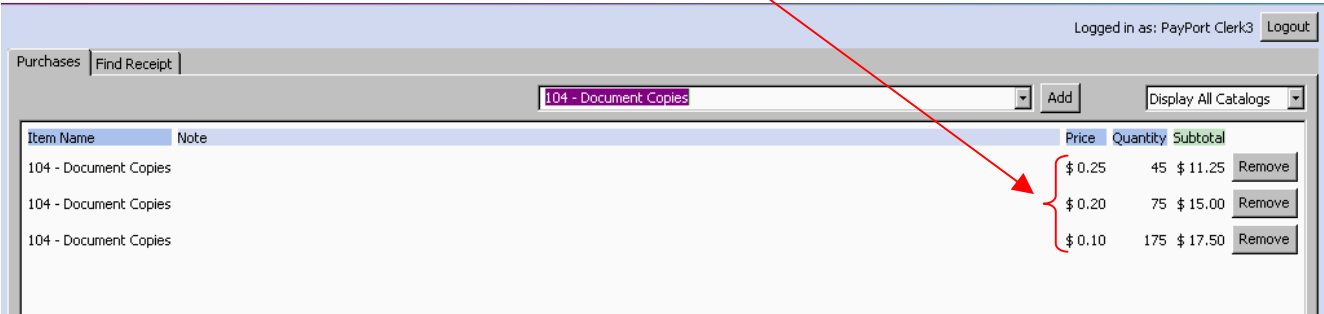
A red circle highlights the 'Note' field for the first row. A red arrow points from the text 'Price/Note—Item with pre-set pricing and space for additional info' to the 'Note' field. A modal window is open for 'Ordering: 101 - Document Search' with a 'Quantity' field set to 1 and a 'Note' field containing 'Lien #8376378'. A red arrow points from the text 'Notes are not searchable' to the 'Note' field in the modal window.

Section 4: Item Types

3. **Variable Price/Comment—Item with manually entered price and space for additional info**



4. **Tiered Pricing—Items with different pre-set prices based on quantity**



5. Taxable—Items pre-set to automatically add sales tax to transaction

Logged in as: PayPort Clerk3 Logout

Purchases Find Receipt

400 - PayPort Mug (taxable) Add Display All Catalogs

Item Name	Note	Price	Quantity	Subtotal	
306 - PayPort T-Shirt, Large (taxable)		\$ 12.95	1	\$ 12.95	Remove
400 - PayPort Mug (taxable)		\$ 6.95	1	\$ 6.95	Remove

Comment

Subtotal: \$ 9.90

Sales Tax: \$ 1.19 Exempt

Processing Fee: \$ 1.63

Total: \$ 22.72 Continue >>

6. Non-taxable—Items which are pre-set not to add tax

PayPort - Beta: Catalog

Logged in as: PayPort Clerk3

Logout

Purchases

Find Receipt

401 - PayPort Mug (non taxable)

Add

Display All Catalogs

Item Name	Note	Price	Quantity	Subtotal	
307 - PayPort T-Shirt, Large (non taxable)		\$ 12.95	1	\$ 12.95	Remove
401 - PayPort Mug (non taxable)		\$ 6.95	1	\$ 6.95	Remove

Comment

Subtotal: \$ 19.90

Sales Tax: \$ 0.00

Processing Fee: \$ 1.60

Total: \$ 21.50

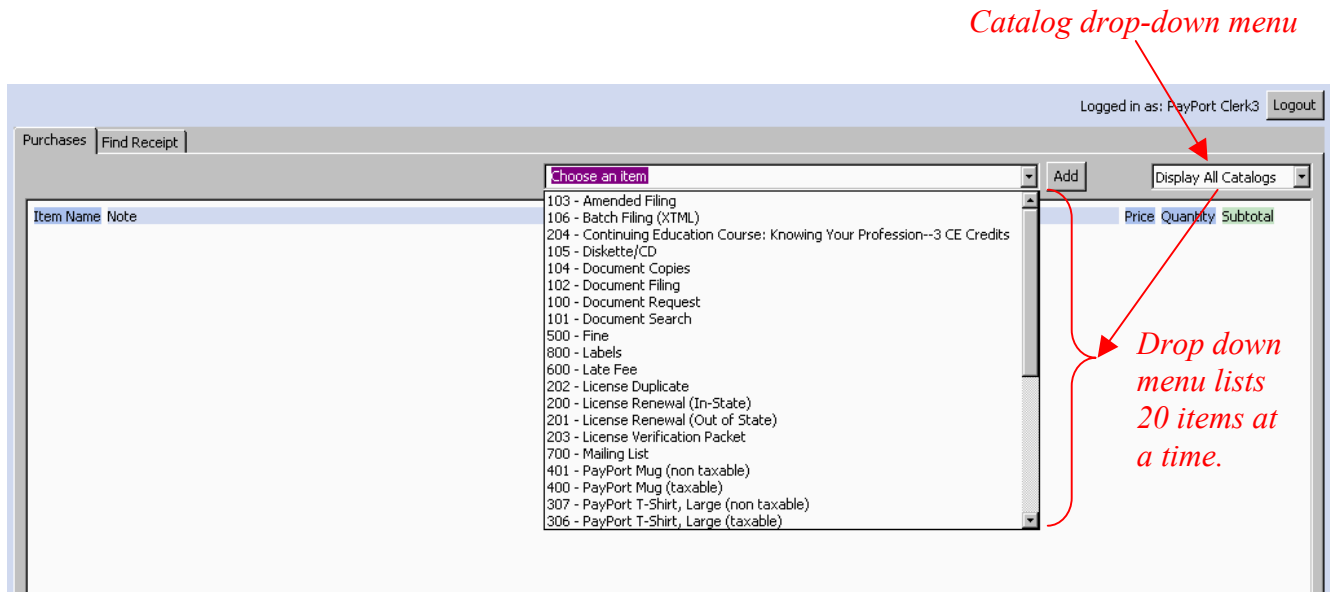
Exempt

Continue >>

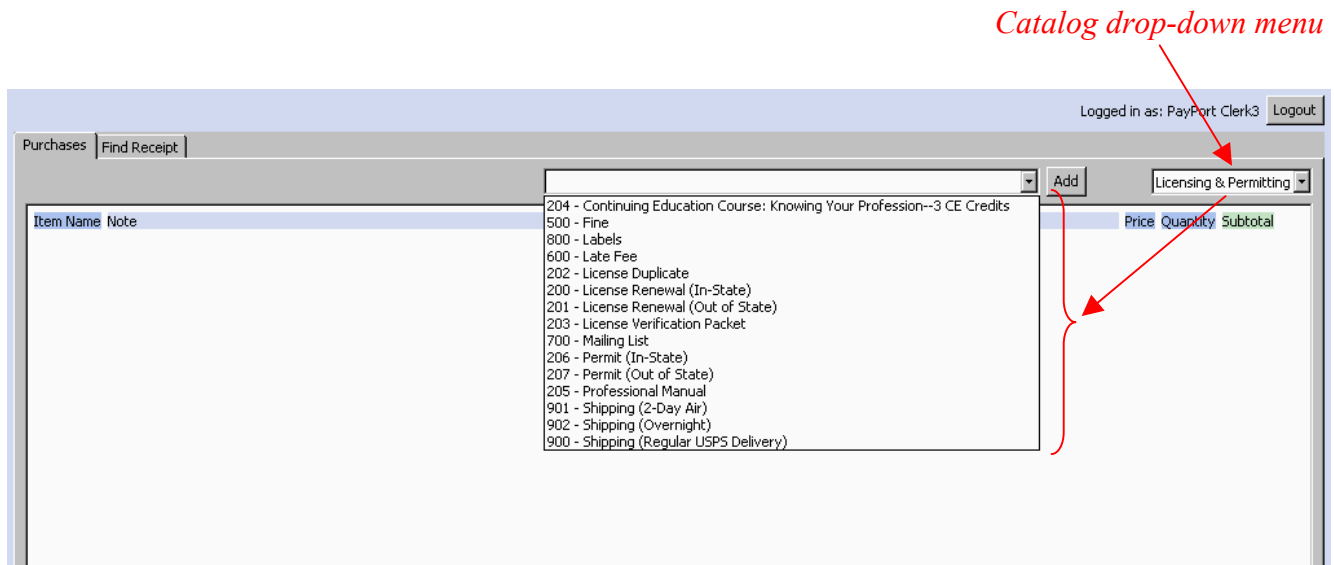
An entire transaction can be made non-taxable by clicking this button.

Section 5: Viewing Catalogs

PayPort defaults to showing all catalogs assigned to your username.

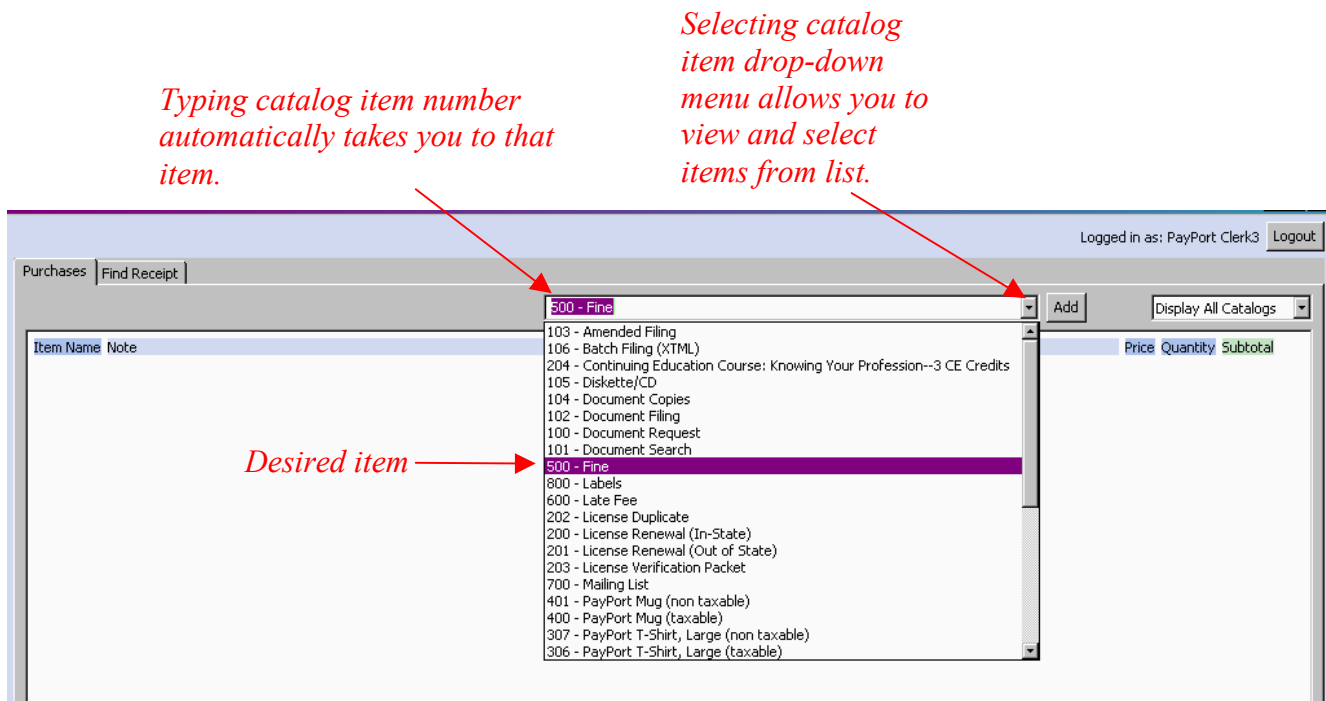


To view only items in a specific catalog, select the catalog drop-down menu and highlight the desired catalog.

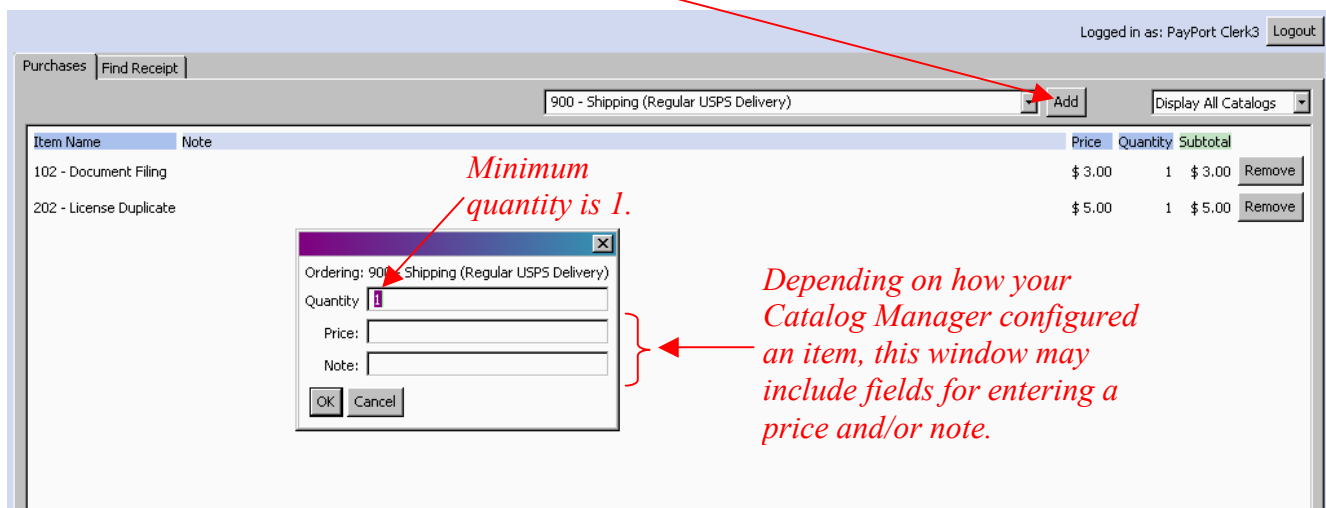


Section 6: Selecting Catalog Items

Step 1. PayPort allows you to find and select catalog items in different ways. It even allows you to navigate between features using only your “Tab” key.



Step 2. Click the “Add” button to display the quantity window for that item.



Section 6: Selecting Catalog Items

Step 3. If applicable, enter price and/or note and select “OK.”

Logged in as: PayPort Clerk3 Logout

Purchases Find Receipt

900 - Shipping (Regular USPS Delivery) Add Display All Catalogs

Item Name	Note	Price	Quantity	Subtotal	
102 - Document Filing		\$ 3.00	1	\$ 3.00	Remove
202 - License Duplicate		\$ 5.00	1	\$ 5.00	Remove

Ordering: 900 - Shipping (Regular USPS Delivery)

Quantity: 1

Price: 1.87

Note: Postage to Denver

OK Cancel

No decimal is necessary for whole dollar values (i.e. \$1, \$2, \$3...).

The non-searchable info entered here is placed under the “Note” column on the Purchases screen as well as the transaction receipt.

Step 4. Click inside Comment field (searchable) to add more info.

Logged in as: PayPort Clerk3 Logout

Purchases Find Receipt

900 - Shipping (Regular USPS Delivery) Add Display All Catalogs

Item Name	Note	Price	Quantity	Subtotal	
102 - Document Filing		\$ 3.00	1	\$ 3.00	Remove
202 - License Duplicate		\$ 5.00	1	\$ 5.00	Remove
900 - Shipping (Regular USPS Delivery)	Postage to Denver	\$ 1.87	1	\$ 1.87	Remove

Comment

For license #48938205

Subtotal: \$ 9.87
Sales Tax: \$ 0.00 Exempt
Processing Fee: \$ 1.30
Total: \$ 11.17 Continue >>

Step 5. After all the items for a transaction are entered, select “Continue>>.”

Section 7: Shipping/Billing Info

Step 1. Select from the two transaction types. Note: Your agency Catalog Manager is responsible for controlling which fields to display or require, so please check with them for specific policies.

Logged in as: PayPort Clerk3 [Logout](#)

[Purchases](#) [Find Receipt](#)

Transaction Type ☒ Over the Counter ☐ Card Not Present

Order Number

* = required information

Billing Address

Address

City

State

Zip Code

Ship To ☒ none ☐ same as billing ☐ shipping address below

Shipping Address

Full Name

Address

City

State

Zip Code

Phone

Email

[<< Back](#) [Continue >>](#)

Section 7: Shipping/Billing Info

Step 2. If required, enter agency order number and credit/debit card billing address (use “Tab” key to jump between fields). Otherwise, you may leave fields blank.

Logged in as: PayPort Clerk3 Logout

Purchases Find Receipt

Transaction Type ☒ Over the Counter ☐ Card Not Present

Order Number 787659

* = required information

Billing Address

Address P.O. Box 1060

City Firth

State ID

Zip Code 83236

Ship To ☐ none ☐ same as billing ☒ shipping address below

Shipping Address

Step 3. Indicate shipping address, if applicable. Selecting “shipping address below” automatically displays fields for information entry.

Logged in as: PayPort Clerk3 Logout

Purchases Find Receipt

Transaction Type ☒ Over the Counter ☐ Card Not Present

Order Number 787659

* = required information

Billing Address

Address P.O. Box 1060

City Firth

State ID

Zip Code 83236

Ship To ☐ none ☐ same as billing ☒ shipping address below

Shipping Address

Full Name Simple Simon

Address 1200 W. Main Street

City Denver

State CO

Zip Code 80220

Phone 303-555-1212

Email simplesimon@pie-man.com

Transaction stage

1 2 3 4 5

<< Back Continue >>

Step 4. Click “Continue>>” after entering information.

Section 8: Transaction Review Screen

This screen allows you to check the transaction for accuracy one last time before continuing to the billing stage.

To proceed to the credit/debit card information screen:

- Select the “Continue>>” button

OR

- Swipe the customer’s debit/credit card (Discover, MasterCard, or VISA) through your card reader

Logged in as: PayPort Clerk3 Logout

Purchases Find Receipt

Review for accuracy
Card Present Transaction

Item	Price	Qty	Note
102 - Document Filing	\$ 3.00	1	
202 - License Duplicate	\$ 5.00	1	
900 - Shipping (Regular USPS Delivery)	\$ 1.87	1	Postage to Denver

Subtotal	\$ 9.87
Sales Tax	\$ 0.00
Processing Fee	\$ 1.30
Total	\$ 11.17

Billing Address
P.O. Box 1060
Firth, ID 83236
v:303-555-1212
simplesimon@pie-man.com

Shipping Address
Simple Simon
1200 W. Main Street
Denver, CO 80220

Transaction stage

1 2 3 4 5

<< Back Continue >>

Section 9: Credit/Debit Card Information Entry

There are two easy ways to enter a customer's credit/debit card (Discover, MasterCard, or VISA) information:

- **Swipe card through card reader (information populates fields automatically)**

OR

- **Manually (*check carefully before clicking the "Finish" button*)**

Logged in as: PayPort Clerk3 Logout

Purchases Find Receipt

Swipe or enter card info

Name on Card Simple Simon

Card Number 4756 9875 6454 2301

Card Type Visa

Expiration MM/YY 10 / 09

Clicking this button sends card information for processing

Transaction stage

1 2 3 4 5

Use "Back" to make any changes before finishing << Back Finish

Section 10: Receipt Features

Clicking the “Print” button at the bottom of the receipt page allows you select a printer and the number of receipts to print.

PayPort On-screen Receipt Example:

Transaction ID (receipt number)

Your agency's order number (optional)

Logged in as: PayPort Clerk3 [Logout](#)

Purchases [Find Receipt](#)

Receipt
3169 - Card Present Transaction
Order #787659; 01/07/2005 12:59 PM

Credit/debit card number (Section 9)
Visa XXXX XXXX XXXX 2301
Your credit card statement will indicate that Access Idaho has billed you for:

Entered in “Note” field—not searchable (Section 6, Step 3)

Item	Price	Qty	Comment	
Document Filing	\$ 3.00	1		\$ 3.00
License Duplicate	\$ 5.00	1		\$ 5.00
Shipping (Regular USPS Delivery)	\$ 1.87	1	Postage to Denver	\$ 1.87
				Subtotal \$ 9.87
				Sales Tax \$ 0.00
				Processing Fee \$ 1.30
				Total \$ 11.17

Entered in “Comment” field on item entry page—searchable (Section 6, Step 4)

For license #48938205

Billing Address
Simple Simon
P.O. Box 1060
Firth, ID 83236

Shipping Address
Simple Simon
1200 W. Main Street
Denver, CO 80220

Billing/shipping/contact info (Section 7)

v:303-555-1212
simplesimon@pie-man.com

Transaction stage

1 2 3 4 5

[New Transaction](#) [Print](#)

Please see next page for *printed* receipt example.

Section 10: Receipt Features

PayPort Printed Receipt Example:

PayPort Agency
999 W. Main St., Ste. 910
Boise, ID 83702-9011
Phone: (208) 332-0102

Header (set-up by Catalog Manager)

3152 - Card Present Transaction
Order #787659 12/29/2004 02:24 PM
Sale by Donna Teller

Internal order number (optional)

Text set-up by Catalog Manager

Visa XXXX XXXX XXXX 2301
Your credit card statement will indicate that Access Idaho has billed you for:

For license #48938205

Items {
Document Filing
License Duplicate
Shipping (Regular USPS Delivery)

1 @	3.00	3.00
1 @	5.00	5.00
1 @	1.87	1.87
Subtotal:		\$ 9.87
Sales Tax:		\$ 0.00
Processing Fee:		\$ 1.30
Total:		\$ 11.17

Comment (searchable)

Simple Simon
P.O. Box 1060
Firth, ID 82639
ph: 208-555-9282 simplesimon@pie-man.com
Thanks for your order!

Billing information

Signature: _____

Footer (set-up by Catalog Manager)

Page 1 of 1

Section 11: Finding Transaction Receipts

Find receipts from transactions you completed by entering search information into one or more data fields and clicking the “Find Transactions” button. Please see your agency’s Catalog Manager for assistance.

Search receipts by:

- **Swiping Credit/Debit Card**
- **Information on Receipt**
- **ACH ID (deposit number)**
- **Transaction Lifecycle**
- **Authorized or Cleared Date Range**
- **Transaction Total**

The screenshot shows the 'Find Receipt' search interface in the PayPort Clerk3 system. The interface includes a header with 'Purchases' and 'Find Receipt' tabs, and a 'Logout' button. The search area is titled 'Enter search data' and contains several input fields: 'Order Number', 'Name on Card', 'Comment', 'Transaction ID', 'ACH ID', 'Transaction Lifecycle' (a dropdown menu), 'Authorized Date (MM/DD/YYYY)' and 'Cleared Date (MM/DD/YYYY)' (both with 'thru' date ranges), and 'Total Amount'. A 'Find Transactions' button is at the bottom. Red annotations with arrows and brackets identify the search criteria: 'Information on receipt' points to Order Number, Name on Card, and Comment; 'Deposit number' points to ACH ID; 'Transaction date ranges' points to the Authorized and Cleared date fields; 'Transaction total' points to the Total Amount field; and a list of transaction lifecycle options (Authorized, Billed, Collected, Billed or Collected) is shown next to the Transaction Lifecycle dropdown.

Logged in as: PayPort Clerk3 Logout

Purchases Find Receipt

Enter search data

Order Number

Name on Card

Comment

Transaction ID

ACH ID

Transaction Lifecycle

Authorized Date (MM/DD/YYYY) / / thru / /

Cleared Date (MM/DD/YYYY) / / thru / /

Total Amount

Find Transactions

Information on receipt

Deposit number

Transaction date ranges

Transaction total

- *Authorized*
- *Billed*
- *Collected*
- *Billed or Collected*